New Tax Organizer and Tax Return Delivery Experience

* Assurance, attest, and audit services provided by Auditwerx, LLC and/or Carr, Riggs & Ingram, L.L.C.

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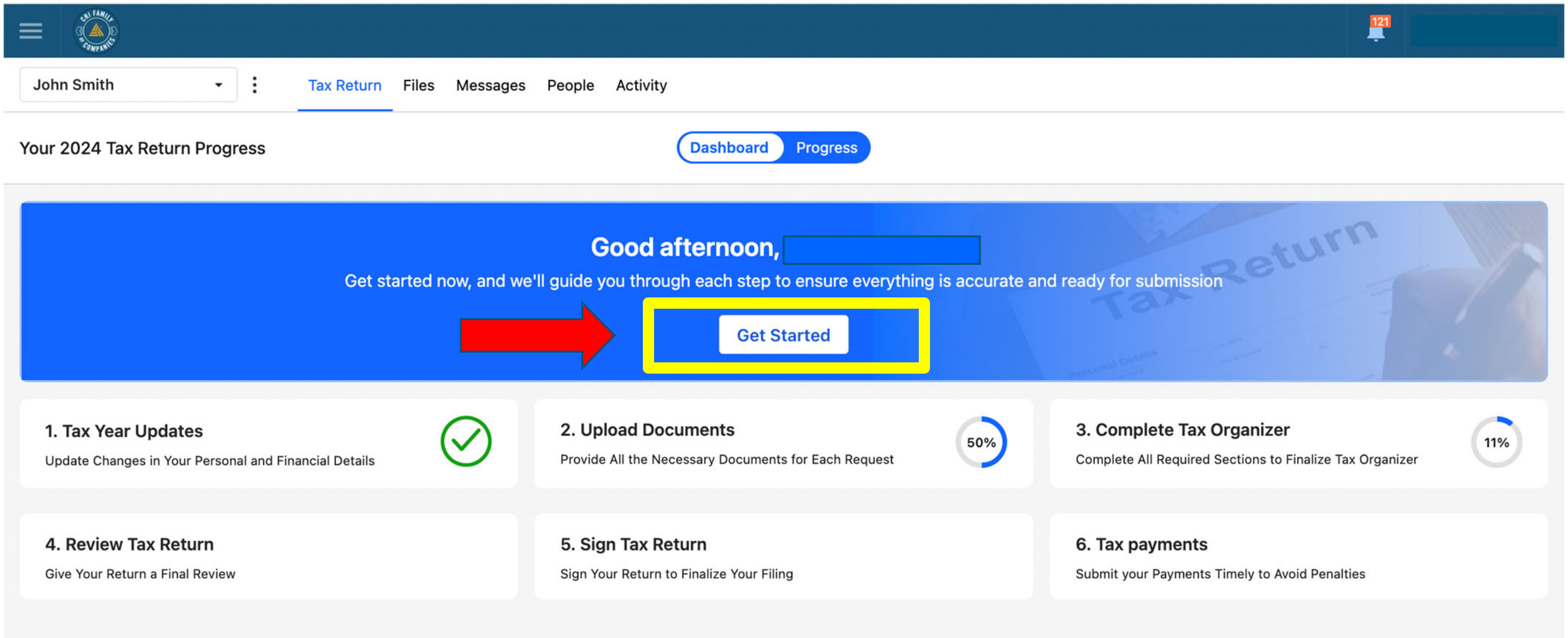
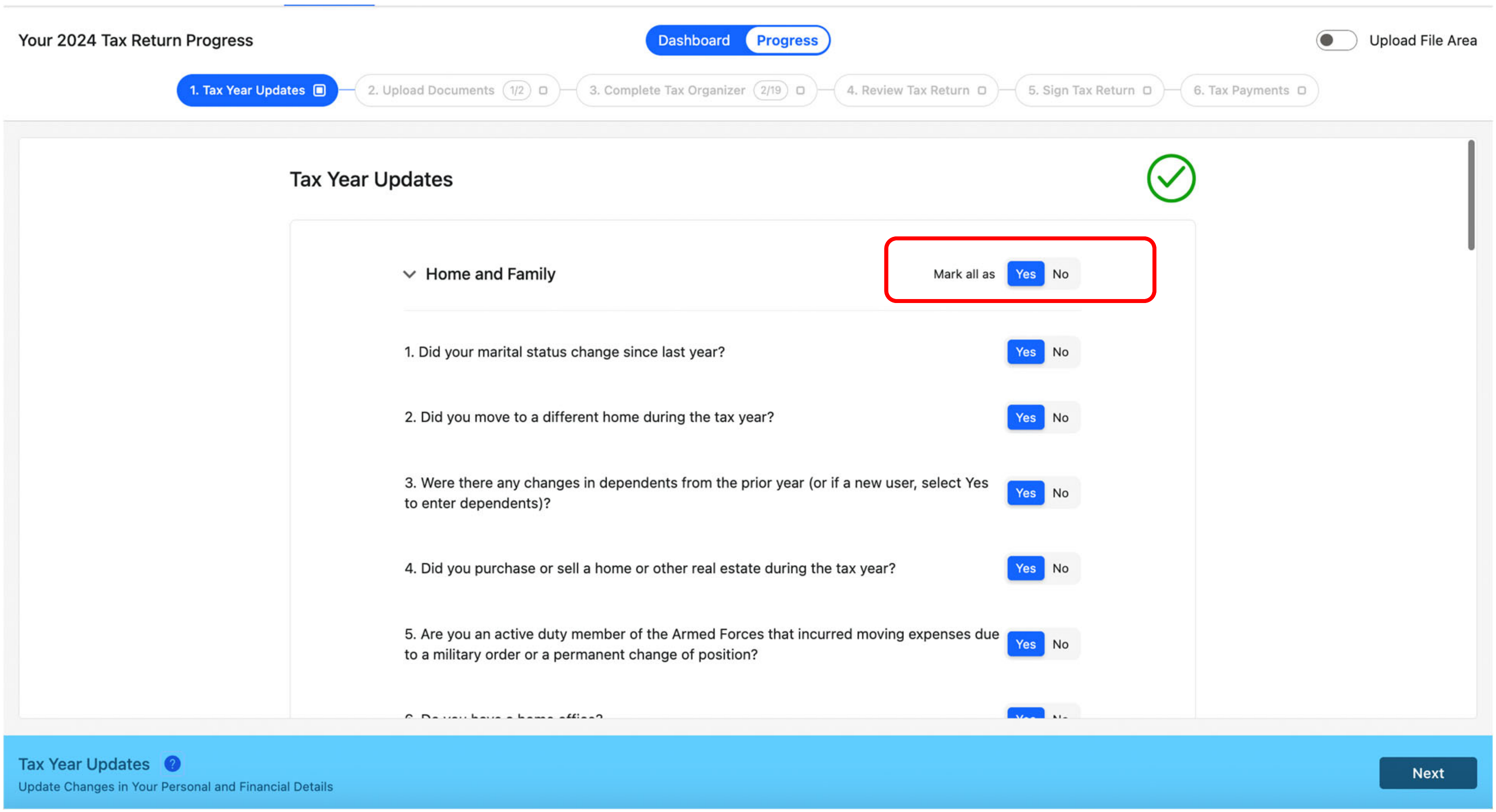
New Client Dashboard with progress tracking

Introducing our new streamlined process for 1040 Tax Organizer and Tax Return Delivery. This new intuitive interface was designed to enhance client experience. Click “Get Started” to begin the process.



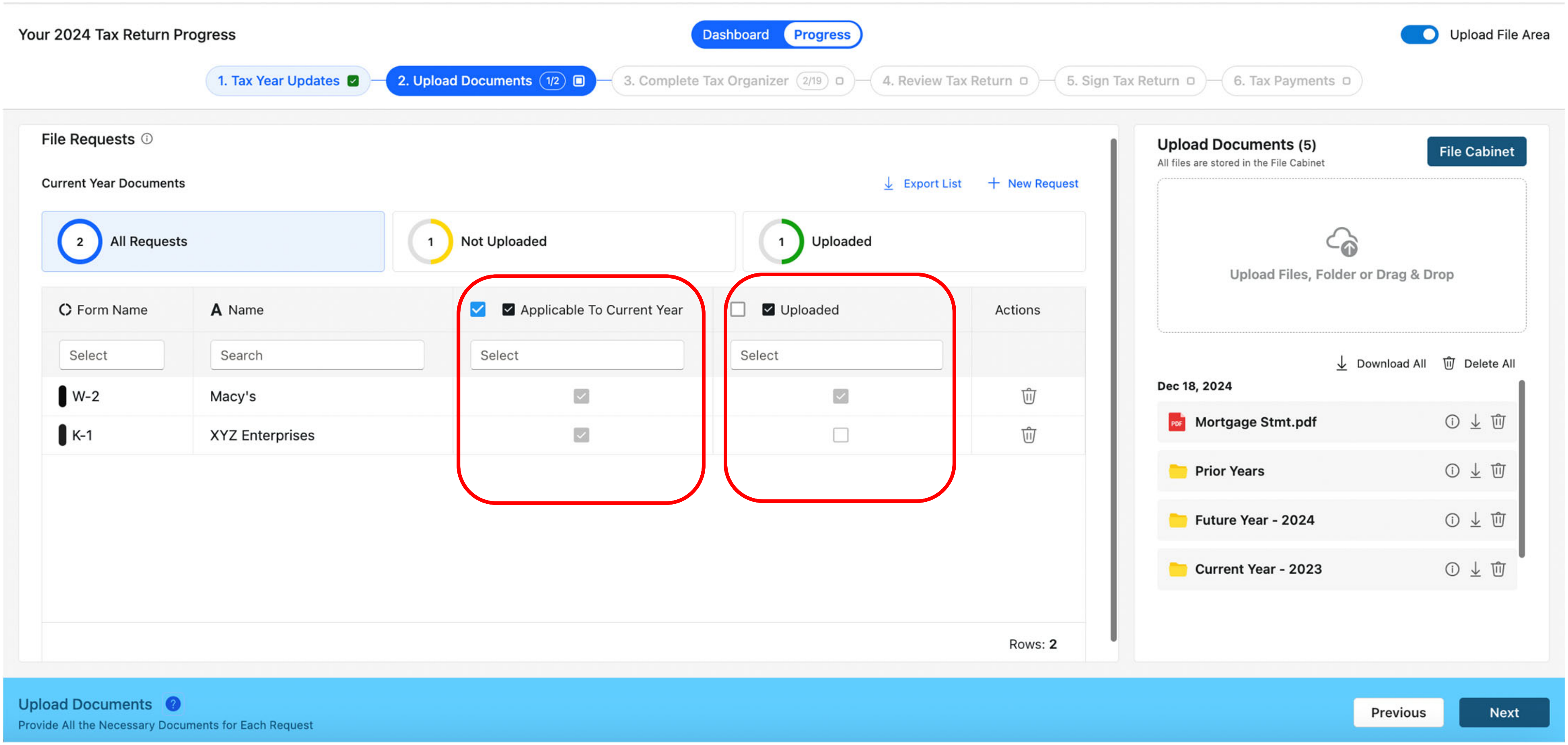
Questionnaire

Client users will start the process by completing their Tax Year Updates questionnaire. You now have an option to mark all responses within each section as "yes" or "no" to expedite answering these questions. In addition, progress % will be shown at the top right and once all questions are answered, the green check will appear.



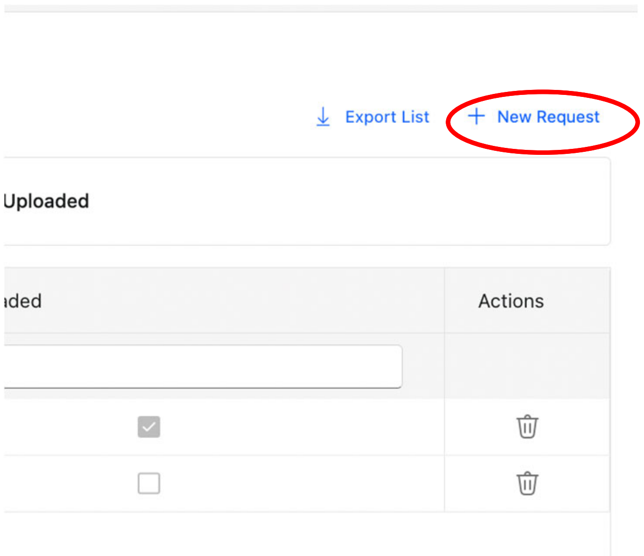
Tax Documents

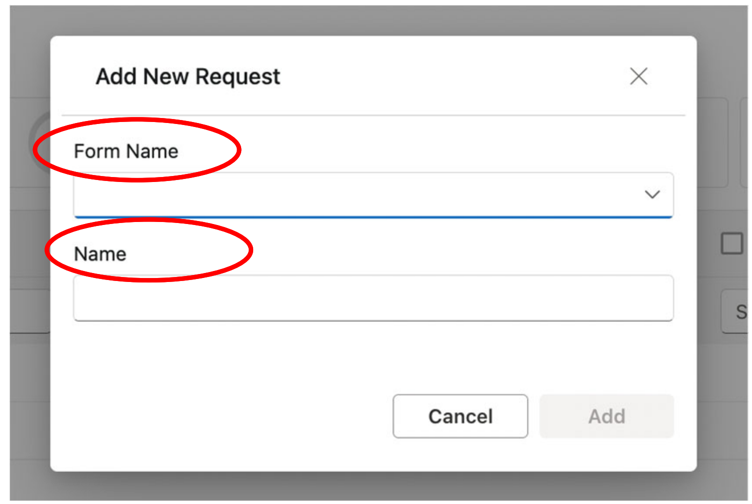
Next, you will proceed to upload relevant tax documents to the new and improved Upload Documents section. The form type and institution name will pre-populate based on your prior year info, and you can indicate if a given document is still applicable to the current year as well as whether it's been uploaded into HubSync.

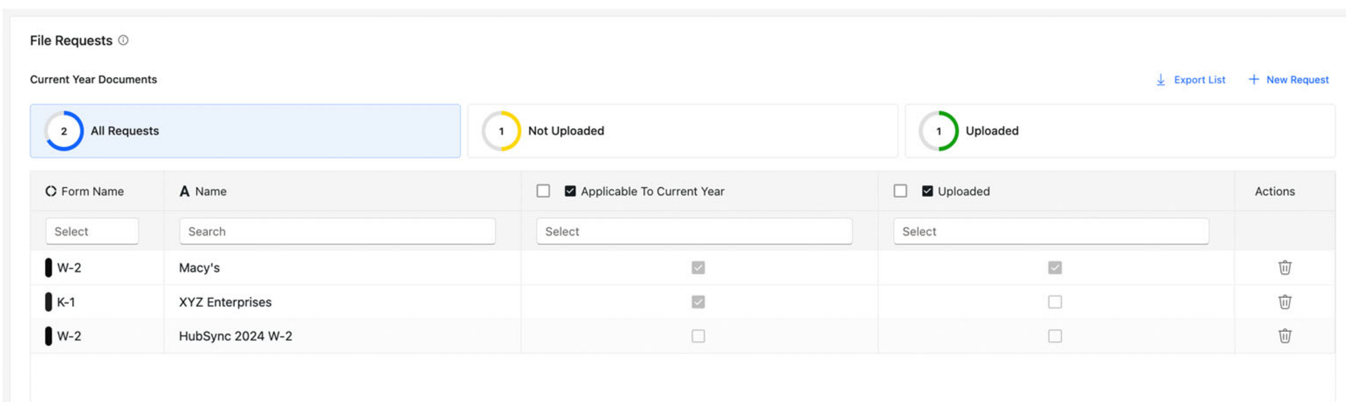


Tax Documents

To create a new record in the document request list, users will click the New Request button and select the Form Name via the dropdown while also inputting a custom name.

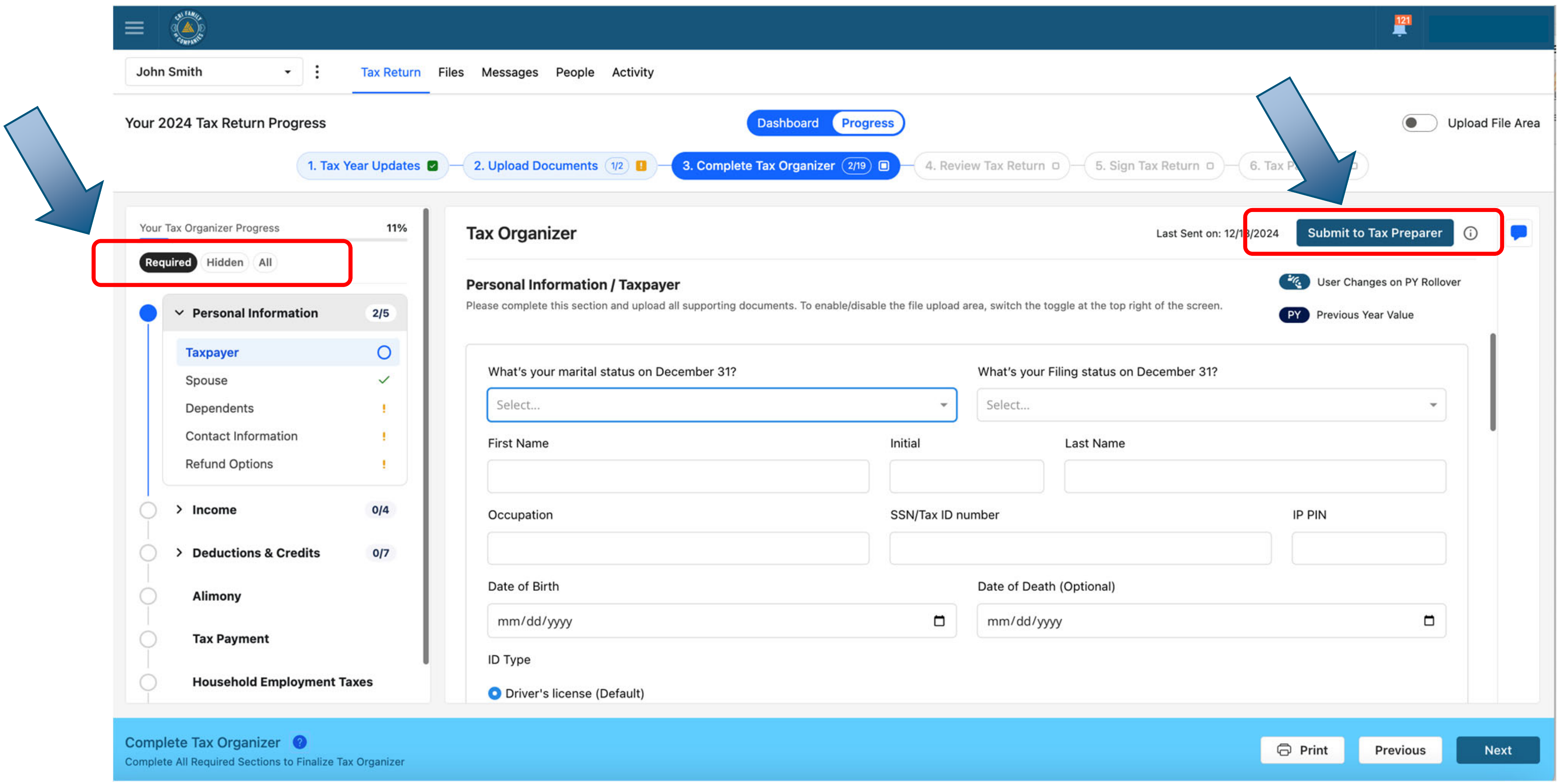






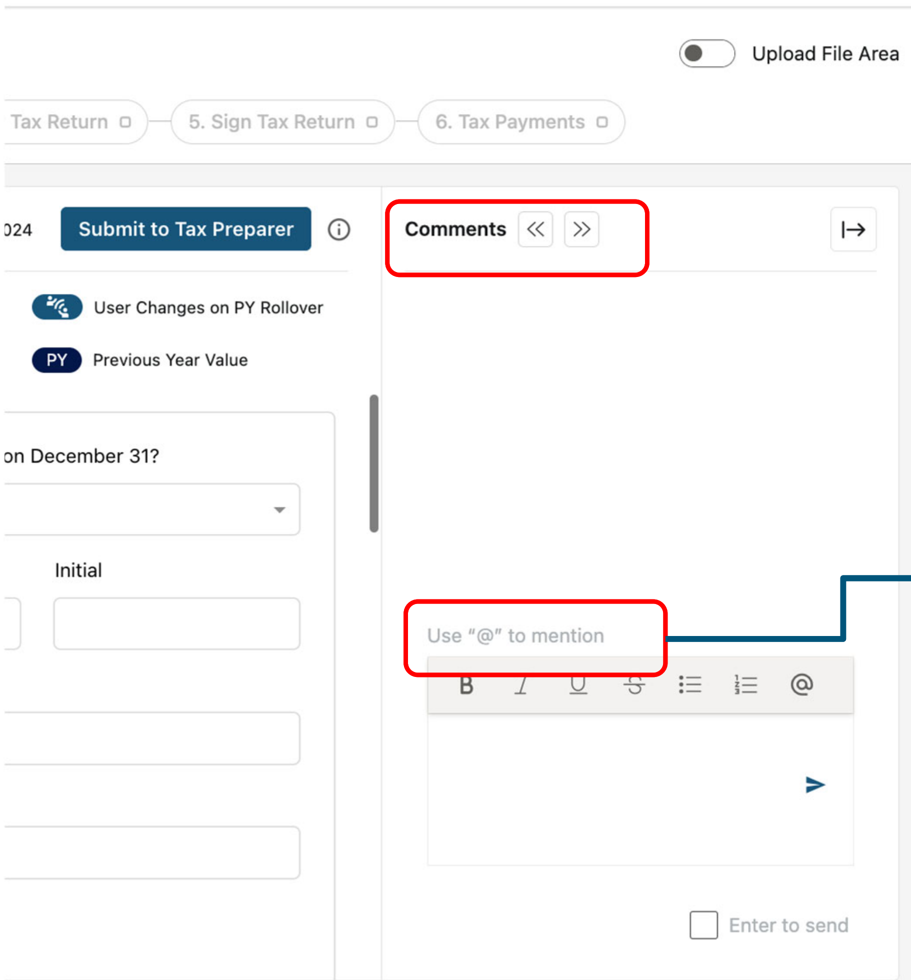
Organizer

After uploading tax documents, users will navigate to the Complete Tax Organizer section. Based on your responses provided during the earlier questionnaire, the organizer sections are automatically customized to you. If you don't see a relevant section of the dynamic organizer, you can simply select Hidden or All to see other sections of the organizer. **After all sections have been completed, click on “Submit to Tax Preparer” button.**



Organizer

The comments feature allows you to comment back and forth with your CRI Professional at the page level.



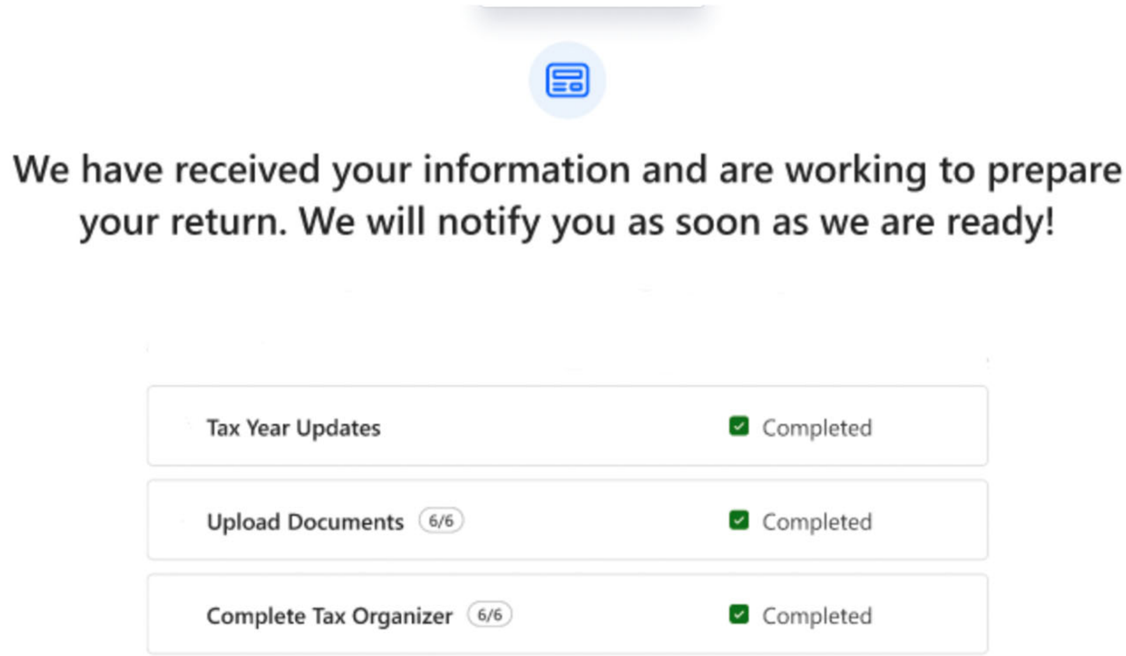
To have your CRI professional notified of your comment, type @CRI Person's Name in the body of your comment. Alternatively, comments may be left without calling out a user.

Note: only users assigned to a workspace will be able to receive comments.

Delivery

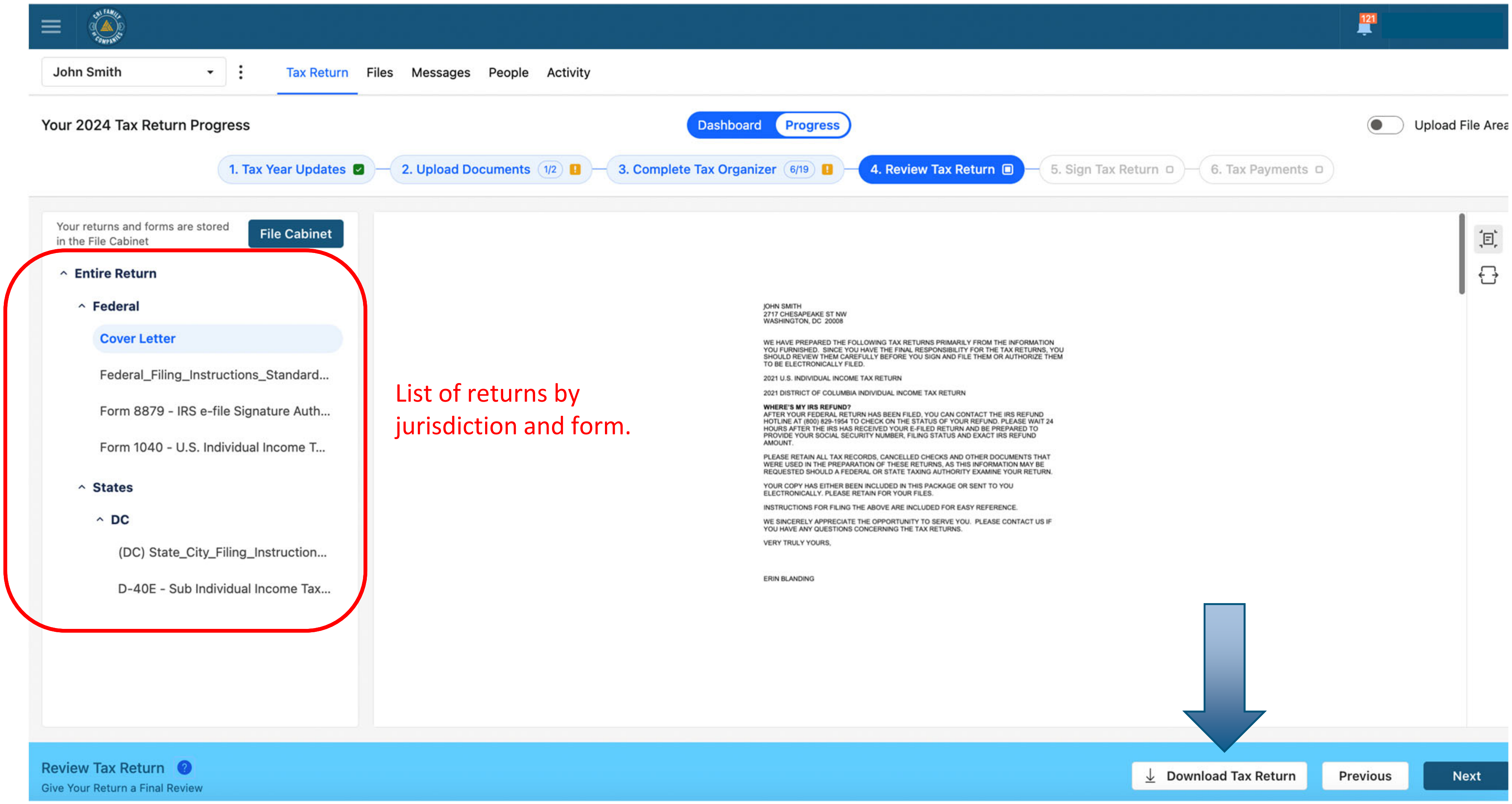
Once the Tax Organizer is completed, your CRI team will analyze your data, prepare and review your return, and reach out to you with any questions.

The Review Tax Return step will show this status screen up until the tax return is delivered.



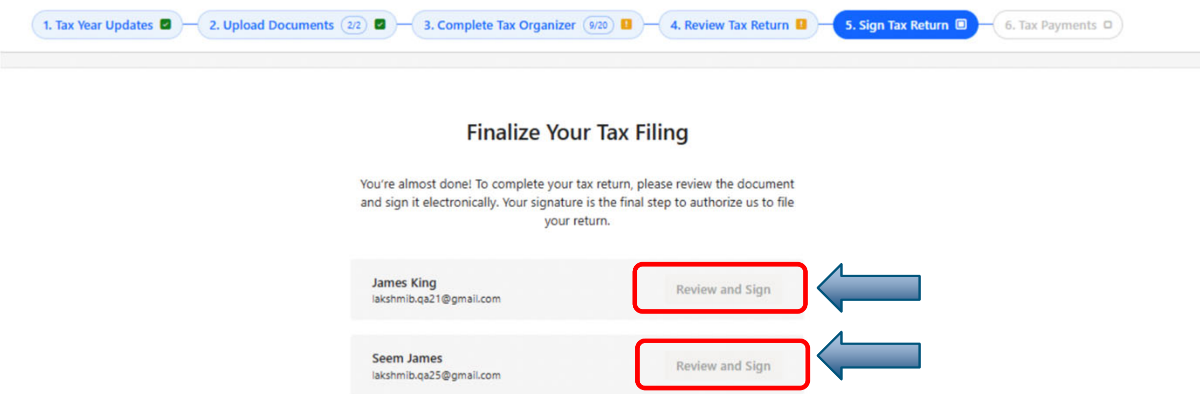
Delivery

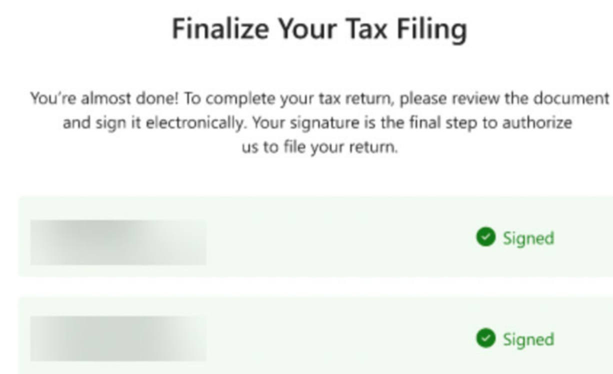
When your tax return is ready, you'll be notified and directed to the Review Tax Return step. You'll be able to download returns for your records as well as review directly on-screen within HubSync.

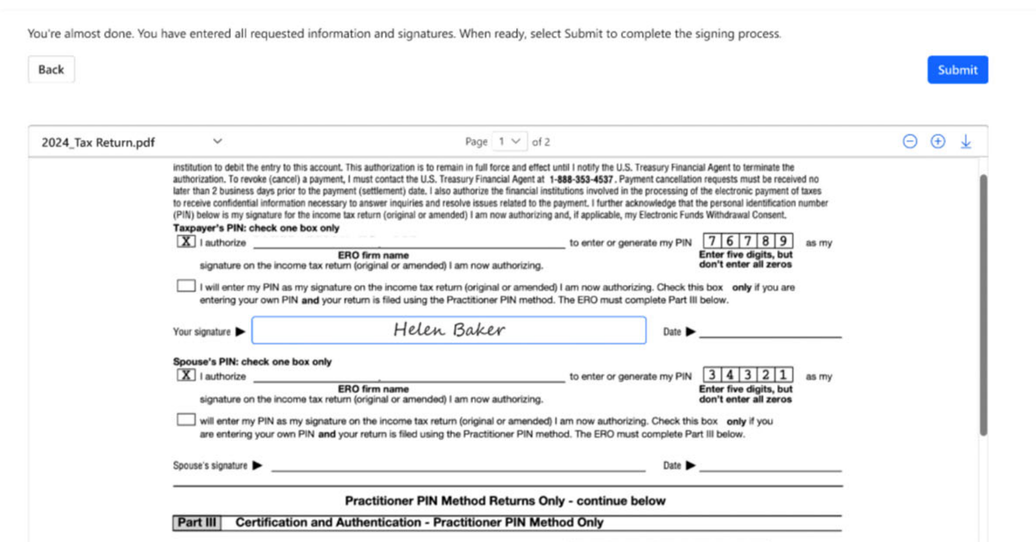


E-Signature

Once reviewed, you'll e-sign the e-File authorization forms via the Sign Tax Return step. Note, signers will be prompted to respond to the identity verification questions (as required by the IRS).

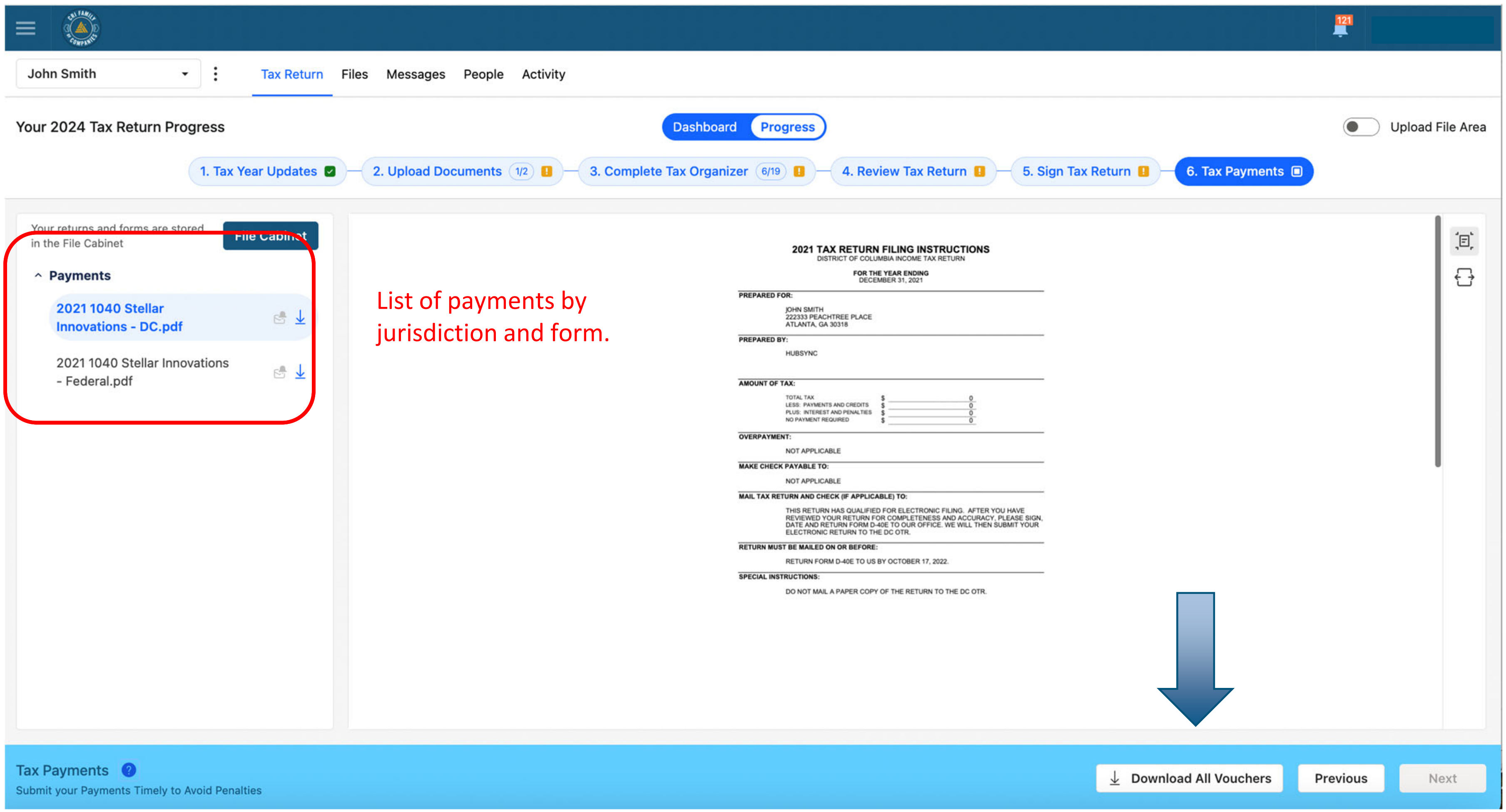






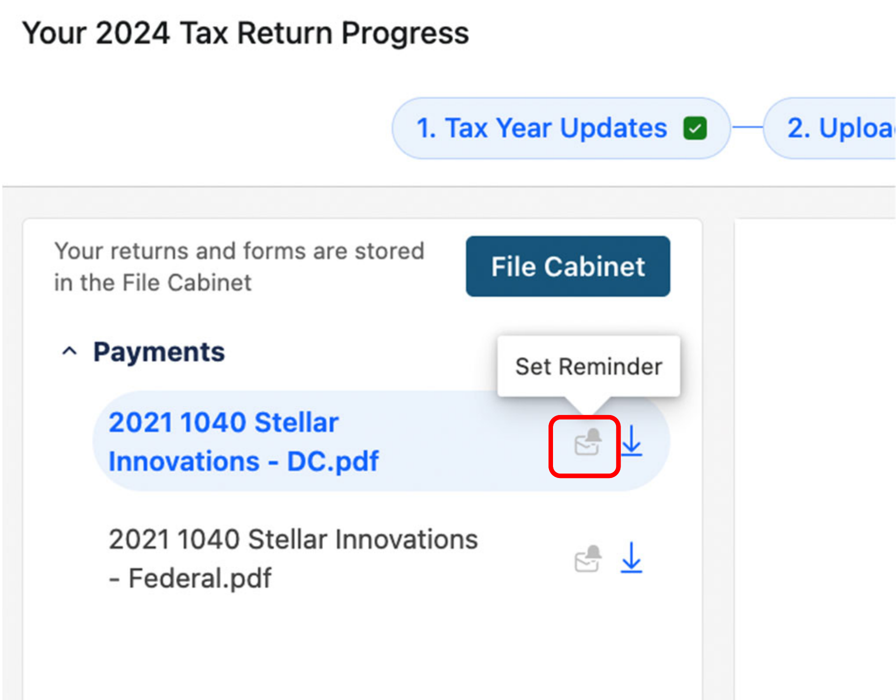
Tax Payment Vouchers

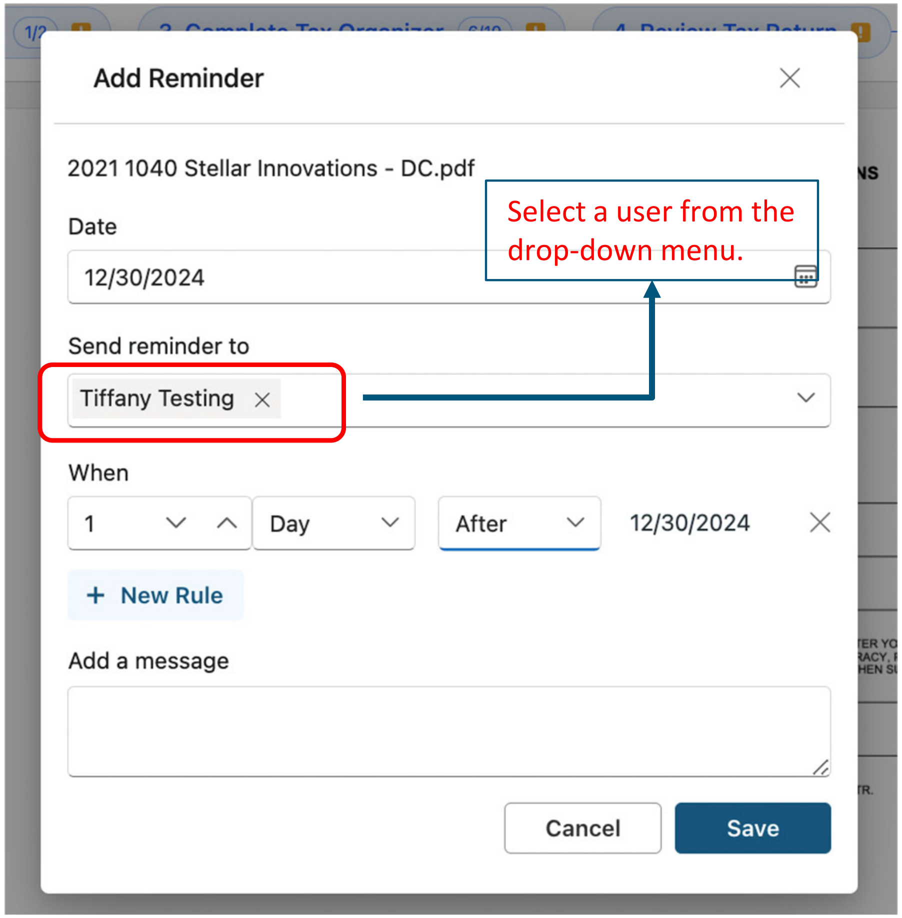
If you have payment vouchers due with the return or estimated tax vouchers, those documents will be easily accessible in the tax payments section. The vouchers will be presented in the Tax Payments step and available for individual review and download.



Payment Reminders

In addition, you have the ability to set payment reminders as due dates approach. You can set multiple reminders for before, after, or on your due date. Each reminder can be assigned to one or multiple people, but keep in mind that only users in your HubSync workspace can set or receive those reminders.





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